Foreign Crops and MARKETS

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L A T E N E W S

Production of apples and pears in Argentina for the coming season is indicated to be larger than last season's output of 4,461,000 and 3,482,000 bushels, respectively. In the Rio Negro Valley where most of the export crop of apples and pears is grown, favorable conditions prevailed during the recent blossoming period and a normal set of fruit is reported. Exports are expected to go principally to Brazil and the United States. The production outlook for other deciduous fruit is favorable. Table grape prospects in Mendoza and San Juan are favorable, although there was some fruit damage in parts of Mendoza.

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Cuba's 1948-49 production of tomatoes, eggplant, peppers and okra is indicated to be 30 to 45 percent less than for the previous crop year. The reduced prospects are a result of poor financial returns to growers, canners and exporters for the past season, and some hurricane damage. Lima bean production is forecast at slightly more than last season, with the cucumber output 40 percent larger.

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A November 11 amendment to New Zealand's 1949 import licensing schedule authorizes licenses for United States prunes in other than retail packages up to 50 percent of the amounts of 1947 licenses for prunes from the United States. The license authorization is conditioned upon shipment not being made before February 1, 1949.

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For the week ending November 17, 1948, there were 15,590 head of feeder and slaughter cattle exported from Canada to the United States, making a total of 205,855 head, excluding calves, since August 16.

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WORLD BREADGRAIN CROP REVISED UPWARD

World breadgrain production in 1948 is now estimated to be slightly larger than forecast in September, according to later information available to the Office of Foreign Agricultural Relations. The wheat crop is now placed at 6,285 million bushels, about 35 million bushels more than the earlier forecast. At that figure the production would be a little larger than average as well as considerably above the small 1947 harvest. The rye production estimate of 1,625 million bushels is 20 million bushels above the previous forecast and, though below average, is about 10 percent larger than in 1947.

The net change of 35 million bushels in the world wheat production is due principally to upward revisions in estimates for some European countries, especially for France, and improved prospects for the Australian harvest. That harvest begins late in November and extends through January. The increases are partially offset by a reduction in the estimate for Turkey. The revision of 20 million bushels in the rye estimate falls entirely in Europe. (For detailed former forecast with comments, see Foreign Crops and Markets, September 20, 1948.)

Changes in North American estimates were minor, with a slight increase in the 1948 Canadian wheat crop counteracted in part by a small reduction in the estimate for the United States, making a net increase of a million bushels in wheat. The net reduction in the 1948 rye production in that area was a million bushels, leaving the estimate for the total breadgrain crop virtually unchanged. Canada's 1947 wheat production estimate was revived downward by 4 million bushels, in the latest official report.

Estimates for Europe were increased by about 30 million bushels of wheat and 20 million bushels of rye, on the basis of the latest information received. Wheat production is now placed at 1,465 million bushels and rye 660 million. An increase of 25 million bushels in the estimate for France is the only large revision in wheat. A large part of the increase for rye is accounted for by more optimistic reports on the crop in Poland, where yields are now expected to approach the prewar level.

No information indicating changes in the 1948 outturn has been received for the Soviet Union, Africa, or South America. The latter continent's wheat harvest, now beginning, remains at 245 million bushels. The forecast of 180 million bushels of wheat for Argentina is below average and is a sharp reduction from last year's outturn of 250 million bushels. The estimate takes into account damage reported from recent frosts in some areas of that country.

(Text continued on Page 442; tables on following pages)

WHEAT: Acreage, yield per acre, and production in specified countries, year of harvest, average 1935-39, annual 1946-48 a/

Continent and country	Acreage b/				Yield per acre c/				Production			
	Average 1935-39	1946	1947	1948 d/	Average 1935-39	1946	1947	1948 d/	Average 1935-39	1946	1947	1948 d/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	Bushels	Bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
NORTH AMERICA:												
Canada	25,595	24,076	24,260	24,106	12.2	17.2	13.9	16.3	312,399	413,725	336,758	393,342
Mexico	1,244	1,025	1,236	1,483	11.5	12.2	12.6	12.4	14,284	12,493	15,616	18,372
United States	57,293	67,075	74,186	71,502	13.2	17.2	18.4	18.0	758,629	1,153,046	1,364,919	1,283,770
Estimated total e/	84,170	92,250	99,750	97,150	-	-	-	-	1,086,000	1,580,000	1,718,000	1,696,000
EUROPE:												
Albania	99	135	130	-	15.2	16.3	15.4	-	1,507	2,200	2,000	-
Austria	630	545	495	520	25.3	18.9	19.6	22.1	15,942	10,300	9,700	11,500
Belgium	402	376	220	385	40.2	43.1	29.5	41.6	16,150	16,200	6,500	16,000
Bulgaria	3,362	3,768	3,680	-	20.5	18.0	-	-	69,080	67,900	-	-
Czechoslovakia	2,175	2,250	2,140	-	26.2	23.6	-	-	57,000	53,000	-	-
Denmark	319	221	60	171	45.4	49.4	36.7	51.6	14,470	10,915	2,200	8,820
Eire	225	643	580	540	34.2	26.9	29.3	34.3	7,689	17,274	17,000	18,500
Finland	230	390	398	411	26.5	20.5	19.1	22.1	6,100	8,000	7,600	9,100
France	12,560	10,106	9,250	11,100	22.8	24.7	16.2	27.0	286,510	250,000	150,000	300,000
Germany	4,250	-	-	-	34.6	-	-	-	147,000	-	-	-
Greece	2,150	1,875	2,000	1,980	14.0	14.1	10.6	14.1	30,205	26,500	21,200	28,000
Hungary	4,091	2,698	3,100	-	22.3	17.8	14.8	-	91,210	48,000	46,000	-
Italy	12,577	11,700	11,500	11,860	22.1	20.3	17.8	21.1	278,366	238,000	205,000	250,000
Luxembourg	47	41	20	40	25.9	23.4	22.5	27.5	1,215	959	450	1,100
Netherlands	338	302	212	244	43.8	43.6	35.4	45.6	14,791	13,180	7,500	11,130
Norway	80	95	86	94	29.9	29.1	27.8	29.8	2,391	2,761	2,390	2,800
Poland	3,260	-	-	-	22.7	-	-	-	74,000	-	-	-
Portugal	1,227	1,616	1,636	1,640	13.1	11.6	7.9	9.1	16,092	18,666	12,860	15,000
Rumania	6,900	-	-	-	16.2	-	-	-	112,000	-	-	-
Spain	f/ 11,253	9,400	9,625	9,640	f/ 14.0	14.1	11.4	12.4	f/157,986	133,000	110,000	120,000
Sweden	740	748	723	780	35.6	33.4	20.3	32.1	26,351	25,017	14,660	25,000
Switzerland	183	232	230	230	33.1	32.2	31.3	39.1	6,050	7,477	7,200	9,000
United Kingdom	1,843	2,062	2,163	2,282	33.8	35.6	28.8	37.2	62,361	73,442	62,250	85,000
Yugoslavia	5,400	-	-	-	18.1	-	-	-	97,700	-	-	-
Estimated total e/	74,350	66,400	64,580	68,960	-	-	-	-	1,592,000	1,310,000	1,025,000	1,465,000
U.S.S.R. (Europe and Asia)	104,000	73,000	75,000	-	11.9	10.7	11.7	-	1,240,000	780,000	875,000	-

ASIA:												
Iran	g/ 4,191	-	-	-	g/ 7.2	-	-	-	g/ 72,128	76,536	70,731	77,000
Iraq	g/ 1,724	2,000	2,000	-	g/ 10.7	7.3	6.2	-	18,114	14,697	12,500	12,000
Lebanon	h/	160	173	173	h/	16.1	11.7	13.9	h/	2,570	2,021	2,400
Palestine	533	340	-	-	6.1	8.4	-	-	3,244	2,873	-	-
Syria	h/ 1,363	1,927	2,084	2,132	h/ 14.3	10.8	7.1	10.8	h/ 19,485	20,900	14,838	23,000
Turkey	8,952	9,246	9,658	9,884	15.2	18.9	13.5	15.7	135,690	175,000	130,000	155,000
China	g/ 49,000	56,800	56,900	52,200	g/ 15.3	15.6	16.2	18.0	g/ 750,000	887,800	919,600	940,000
Manchuria	2,896	-	-	-	12.4	-	-	-	36,035	-	-	-
India i/	34,492	34,977	34,121	35,000	10.7	9.6	8.5	10.0	370,660	337,419	290,752	350,000
Japan	1,735	1,562	1,492	-	28.8	14.5	19.1	-	49,954	22,613	28,550	-
Korea	832	-	-	-	12.3	-	-	-	10,240	-	-	-
Estimated total e/	107,900	114,670	115,310	111,910	-	-	-	-	1,490,000	1,583,000	1,517,000	1,650,000
SOUTH AMERICA:												
Argentina	15,834	13,884	11,656	12,000	14.0	14.9	21.4	15.0	221,769	206,314	250,000	180,000
Brazil	442	811	-	-	10.5	13.0	-	-	4,652	10,546	-	-
Chile	1,963	1,873	2,023	2,149	16.1	17.7	19.5	16.3	31,562	33,163	39,400	35,000
Peru	285	247	247	-	11.5	14.9	14.1	-	3,274	3,674	3,491	-
Uruguay	1,210	659	1,218	1,250	11.0	10.1	13.6	11.6	13,255	6,681	16,534	14,500
Estimated total e/	20,500	18,200	16,450	17,040	-	-	-	-	280,000	265,000	325,000	245,000
AFRICA:												
Algeria	4,184	3,200	3,700	3,730	8.4	11.2	7.6	12.1	35,201	36,000	28,000	45,000
Egypt	1,464	1,646	1,692	1,573	31.3	26.0	23.9	26.4	45,848	42,743	40,500	41,500
French Morocco	3,254	2,417	3,000	2,590	7.5	11.4	8.2	8.9	24,314	27,462	24,500	23,000
Tunisia	1,915	1.670	-	2,044	7.8	7.5	-	5.4	14,962	12,500	11,000	11,000
Union of South Africa j/	1,926	2,300	2,500	-	8.3	6.7	6.7	-	16,025	15,322	16,777	18,860
Estimated total e/	13,820	12,600	13,830	13,790	-	-	-	-	144,000	143,000	130,000	150,000
OCEANIA:												
Australia	13,128	13,180	13,874	13,000	12.9	8.9	15.9	14.2	169,744	117,262	220,000	185,000
New Zealand	221	141	119	150	32.3	38.1	36.0	35.3	7,129	5,368	4,284	5,300
Total	13,349	13,321	13,993	13,150	-	-	-	-	176,873	122,630	224,284	190,300
Estimated world total e/	418,090	390,440	398,910	407,000	-	-	-	-	6,010,000	5,785,000	5,815,000	6,285,000

a/ Years shown refer to years of harvest in the Northern Hemisphere. Harvests of Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow: thus, the crop harvested in the Northern Hemisphere in 1948 is combined with preliminary forecasts for the Southern Hemisphere harvests which will begin late in 1948 and end early in 1949. b/ Figures refer to harvested areas as far as possible. c/ Yield per acre calculated from acreage and production data shown, except for incomplete periods. d/ Revised estimates for Northern Hemisphere countries; for Southern Hemisphere, preliminary forecasts based largely on acreage and weather conditions to date. e/ Estimated totals, which in the case of production are rounded to millions, include allowances for any missing data for countries shown and for other producing countries not shown. f/ Figure for 1935 only. g/ Average of less than 5 years. h/ Estimates for Syria and Lebanon not shown separately during this period. i/ Includes Pakistan. Estimates for reporting area only. Allowances for non-reporting area, not shown, are included in estimated total for Asia. j/ European production only.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States Foreign Service officers, results of office research or other information. Prewar estimates for countries having changed boundaries have been adjusted to conform to present boundaries.

RYE: Acreage, yield per acre, and production in specified countries, year of harvest, average 1935-39, annual 1946-48 a/

Continent and country	Acreage b/				Yield per acre c/				Production			
	Average 1935-39	1946	1947	1948 d/	Average 1935-39	1946	1947	1948 d/	Average 1935-39	1946	1947	1948 d/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	Bushels	Bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
NORTH AMERICA:												
Canada	816	715	1,156	2,103	11.3	12.3	11.4	12.1	9,191	8,811	13,217	25,348
United States	3,699	1,607	2,022	2,187	12.1	11.7	12.8	12.2	44,917	18,879	25,977	26,664
Total	4,515	2,322	3,178	4,290	-	-	-	-	54,108	27,690	39,194	52,012
EUROPE:												
Austria	881	620	580	640	23.4	19.0	19.7	21.9	20,611	11,800	11,400	14,000
Belgium	369	287	230	235	38.8	36.6	37.8	40.4	14,319	10,500	8,700	9,500
Bulgaria	635	500	746	-	17.6	17.0	-	-	11,150	8,500	-	-
Czechoslovakia	2,350	2,160	2,100	-	26.0	25.5	-	-	61,000	55,000	-	-
Denmark	354	343	259	418	28.2	32.9	27.2	37.1	9,973	11,289	7,050	15,500
Finland	500	366	387	368	24.6	19.7	20.9	20.4	12,300	7,200	8,100	7,500
France	1,614	1,150	1,170	1,360	18.6	17.0	15.1	17.8	30,013	19,500	17,700	24,200
Germany	7,035	-	-	-	29.1	-	-	-	205,000	-	-	-
Greece	163	133	158	125	13.8	14.8	10.8	14.4	2,244	1,970	1,700	1,800
Hungary	1,583	1,122	1,210	-	18.5	14.9	14.5	-	29,354	16,701	17,500	-
Italy	e/ 252	255	250	260 e/	21.7	17.6	17.2	19.2	e/ 5,456	4,500	4,300	5,000
Luxembourg	18	15	13	15	25.7	25.7	21.2	26.7	462	386	275	400
Netherlands	559	556	448	454	35.1	32.3	27.9	32.7	19,626	17,948	12,506	14,860
Norway	13	6	4	7	31.2	32.8	25.0	35.7	405	197	100	250
Poland	13,425	-	-	-	21.2	-	-	-	284,000	-	-	-
Portugal	342	598	625	625	13.1	10.2	9.4	10.4	4,485	6,100	5,900	6,500
Rumania	640	-	-	-	15.6	-	-	-	10,000	-	-	-
Spain	f/ 1,415	1,466	1,460	1,460 f/	13.6	13.7	12.3	13.7	f/ 19,205	20,078	18,000	20,000
Sweden	495	387	285	395	30.0	29.4	19.7	31.0	14,828	11,384	5,614	12,500
Switzerland	38	37	35	35	33.2	30.6	28.3	31.4	1,260	1,134	990	1,100
United Kingdom	16	55	36	61	24.9	28.4	24.4	30.2	398	1,560	880	1,840
Yugoslavia	633	-	-	-	13.4	-	-	-	8,500	-	-	-
Estimated total g/	33,340	25,370	27,290	23,500	-	-	-	-	765,000	510,000	495,000	650,000
U.S.S.R. (Europe and Asia)	60,800	70,000	71,000	- e/	14.6	12.3	13.0	-	e/885,000	860,000	920,000	-
ASIA:												
Turkey	939	988	1,046	1,070	15.2	18.4	14.3	14.5	14,301	18,200	15,000	15,500
SOUTH AMERICA:												
Argentina	1,078	2,282	1,731	1,700	9.1	9.5	10.8	9.4	9,771	21,739	18,700	16,000
AFRICA:												
Union of South Africa	e/ 117	191	191	- e/	6.8	7.1	8.4	-	794	1,349	1,604	-
Estimated world total g/	100,900	102,290	104,580	107,890	-	-	-	-	1,730,000	1,441,000	1,490,000	1,625,000

a/ Years shown refer to years of harvest in the Northern Hemisphere. Harvests of Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately foolow; thus, the crop harvested in the Northern Hemisphere in 1948 is combined with preliminary forecasts for the Southern Hemisphere harvests, which will begin late in 1948 and end early in 1949. b/ Figures refer to harvested areas as far as possible. c/ Yield per acre calculated from acreage and production data shown, except for incomplete periods. d/ Revised estimates for Northern Hemisphere countries; for Southern Hemisphere, preliminary forecasts based largely on acreage and weather conditions to date. e/ Average of less than 5 years. f/ Figure for 1935-only. g/ Estimated totals, which in the case of production are rounded to millions, include allowances for any missing data for countries shown and for other producing countries not shown.

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WORLD 1948-49 SUGAR PRODUCTION UP 11 PERCENT

World production of beet and cane sugar for the 1948-49 season is indicated at 37,694,000 short tons (raw value), 11 percent more than the 33,869,000 tons produced in 1947-48 and 9 percent more than the 5-year (1935-39) average of 34,710,000 tons.

Major increases in Mexico, Europe generally, the U.S.S.R., India, Pakistan, the Philippines, Formosa, Java, Australia and Hawaii more than offset decreases in the United States and Cuba. The world prospective output (considering the production in India and Pakistan in terms of gur) is the largest on record and compares with the previous high produced in the 1939-40 season of 36,238,000 short tons. The large crop this season is notable because 3 important exporting areas, the Philippines, Formosa and Java have not yet reached prewar levels.

World beet sugar production in 1948-49 is expected to total 11,503,000 short tons, compared with 9,206,000 tons in 1947-48 and the 5-year (1935-39) average of 12,025,000 tons. The increases in Europe, the U. S. S. R., and Turkey more than offset a decrease in the United States. Beet sugar production has recovered sharply from a recent low level of 6,626,000 tons produced in 1945-46, but still is substantially below the record high of 12,912,000 tons produced in 1930-31.

World cane sugar production is expected to reach a new-record high level of 26,191,000 short tons in 1948-49, and will exceed the previous high record of 24,663,000 tons in 1947-48 and the 5-year (1935-39) average of 22,685,000 tons. About one-half of the increase in recent years has been contributed by the increase in the production of Gur in India and Pakistan. In the other cane areas, major increases in the Philippines, Formosa, Java and Australia more than offset a decrease in Cuba this season, as compared with last season.

In North and Central America, including the West Indies, present indications point to a total production of sugar of 11,315,000 short tons compared with 12,004,000 tons in 1947-48 and the 5-year average of 7,801,000 tons. In Mexico and some of the Central American and West Indian areas sugar production is expected to reach new-high record levels in 1948-49, but decreases are expected in the United States and Cuba. The United States' figures for sugar production are not official, but are calculated from the November indicated production of sugar beets and cane. The Cuban cane crop has benefited from good growing weather this season, and, except for some hurricane damage, the yield is expected to be excellent. The decrease in production from 6,675,000 to 6,000,000 tons is largely due to a smaller acreage available for harvest than in 1947-48.

The European sugar beet acreage was increased materially in 1948 and growing conditions have been much improved over those of 1947. Consequently, there are excellent prospects for a sharp recovery in beet sugar production over the levels of the last few years. For Europe as a whole (excluding the U.S.S.R.) sugar production now is indicated at 7,258,000 short tons compared

(Text continued on page 443; table follows:)

SUGAR (raw value): Production in specified countries a/
averages 1930-34, 1935-39, and annual 1945-48

Countries by continent	Average 1930-34	Average 1935-39	1945	1946	1947	1948 b/
	1,000 S. tons	1,000 S. tons	1,000 S. tons	1,000 S. tons	1,000 S. tons	1,000 S. tons
NORTH AMERICA (cane)						
British Honduras	0	1	1	1	1	1
Canada (beet)	66	76	88	115	87	87
Costa Rica	7	9	9	17	22	20
El Salvador	23	19	22	32	30	30
Guatemala	38	38	64	68	83	90
Honduras	1	2	2	2	2	2
Mexico	268	364	444	578	701	820
Nicaragua	6	9	17	16	19	22
Panama, incl. Canal Zone	3	5	7	9	12	14
United States (beet)	1,396	1,520	1,278	1,523	1,832	1,450
United States (cane)	236	474	475	425	376	430
Caribbean						
Antigua	19	25	30	27	14	25
Barbados	90	133	127	99	64	67
Cuba	2,847	3,183	4,476	6,448	6,675	6,000
Dominican Republic	439	491	504	513	465	490
Grenada	1	1	1	1	1	1
Guadeloupe	40	53	33	34	39	40
Haiti	28	44	44	49	46	50
Jamaica	69	119	199	191	216	255
Martinique	49	62	26	38	33	43
Puerto Rica	894	974	909	1,088	1,108	1,200
St. Kitts	25	36	36	38	36	36
St. Lucia and St. Vincent	6	9	8	8	8	8
Trinidad and Tobago	121	148	123	123	130	130
Virgin Islands of the U.S.	3	6	6	3	4	4
Total NORTH AMERICA	6,675	7,801	8,929	11,446	12,004	11,315
EUROPE (beet)						
Austria	192	196	20	28	45	60
Belgium	278	259	155	258	155	265
Bulgaria	36	24 c/	21 c/	36 c/	22 c/	72
Czechoslovakia	806	721	493	651	386	700
Denmark	173	257	203	237	248	294
Eire	37	89	116	64	88	105
Finland	7	13 c/	5 c/	6 c/	11 c/	20
France	1,112	1,059	508	842	734	1,070
Germany	1,838	2,122 c/	860 c/	1,105 c/	862 c/	1,480
Hungary	158	139	8	74	168	250
Italy	397	416	21	293	269	490
Netherlands	262	255	66	273	263	294
Poland and Danzig	546	548 c/	216 c/	470 c/	605 c/	675
Rumania	113	129 c/	38 c/	35 c/	88 c/	125
Spain d/	374	209	132	208	180	293
Sweden	252	340	325	320	275	300
Switzerland	8	112	31	24	26	30
United Kingdom	497	527	605	693	518	630
Yugoslavia	89	93	38	75	95	105
Total EUROPE (excl. USSR)	7,175	7,408	3,861	5,692	5,038	7,258
U.S.S.R. (Europe and Asia) e/ (beet)	1,584	2,887	1,200	775	2,050	2,500
ASIA (cane)						
Iran (beet)	4	21	25	40	63	50
Turkey (beet)	41	75	118	118	119	145
Burma	f/	78	20	40	25	25
China	285	438	350	369	380	400
Manchuria (beet)	10	14	30	29	29	29
Formosa	889	1,202	95	38	328	500

SUGAR (raw value): Production in specified countries a/
averages 1930-34, 1935-39, and annual 1945-48

Countries by continent	Average 1930-34	Average 1935-39	1945	1946	1947	1948 b/
	1,000 S. tons	1,000 S. tons	1,000 S. tons	1,000 S. tons	1,000 S. tons	1,000 S. tons
ASIA (Continued)						
French Indochina g/	59	76	6	15	20	25
Pakistan g/	658	799	972	954	915	1,000
India g/	4,424	5,369	5,094	5,503	5,901	6,500
Japan h/	134	167	50	10	20	20
Java and Madura i/	1,731	1,447	22	25	100	300
Philippine Islands j/	1,177	1,127	115	184	498	820
Total ASIA (excl.U.S.S.R.)	9,412	10,813	6,897	7,325	8,398	9,814
SOUTH AMERICA (cane)						
Argentina	381	480	495	700	668	600
Brazil	1,105	1,159	1,394	1,606	1,586	1,600
British Guiana	163	209	184	185	200	200
Colombia	32	47	90	97	117	120
Ecuador	22	24	38	39	40	46
Paraguay	7	7	9	21	18	18
Peru	441	448	438	476	495	515
Surinam	21	19	6	4	5	5
Uruguay (beet)	2	2	2	2	2	2
Venezuela	23	19	33	36	40	45
Total SOUTH AMERICA	2,197	2,414	2,689	3,166	3,171	3,151
AFRICA (cane)						
Belgian Congo	5	15	16	16	18	18
British East Africa	30	63	68	71	89	96
Kenya	-	-	9	7	12	10
Tanganyika	-	-	8	9	9	11
Uganda	-	-	51	55	68	75
Egypt	161	167	198	210	235	250
Madagascar	8	13	18	14	12	12
Madeira Islands and Azores	9	9	7	8	8	8
Mauritius	236	321	175	320	386	397
Mozambique	93	79	79	79	85	85
Angola	26	38	56	49	50	50
Reunion	64	92	27	58	95	95
Union of South Africa	366	498	553	475	512	575
Total AFRICA	998	1,295	1,197	1,300	1,490	1,586
OCEANIA (cane)						
Australia	667	894	746	619	691	940
Fiji	117	143	61	123	157	145
Hawaiian Islands	1,042	986	680	872	870	985
Japanese Mandated Islands	52	69	0	0	0	0
Total OCEANIA	1,878	2,092	1,487	1,614	1,718	2,070
Total (beet)	10,284	12,025	6,626	8,281	9,206	11,503
Total (cane)	19,635	22,685	19,634	23,037	24,663	26,191
World total (beet and cane)	29,919	34,710	26,260	31,318	33,869	37,694

a/ Years shown are for crop years: generally the harvesting season begins in the fall months of the year shown or in the early months of the following year, except in certain cane-sugar-producing countries in the Southern Hemisphere, such as Australia, Argentina, Mauritius, Union of South Africa, etc., where the season begins in May or June of the year shown. b/ Preliminary. c/ Data not comparable with previous years because of boundary changes. d/ Includes a small quantity of cane sugar. e/ Includes Latvia and Lithuania. f/ Included in India. g/ Data are in terms of gur, a low grade of brown sugar. h/ Includes cane and beet sugar. i/ Data for Java are for the calendar years following the years shown. j/ Includes centrifugal and muscovado sugar.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States Foreign Service officers, results of office research and other information. Estimates of countries having boundary changes have been adjusted to prewar boundaries except as noted.

WORLD PEANUT PRODUCTION ATTAINS NEW RECORD 1/

World peanut production for 1948 is expected to attain a new record, according to a preliminary estimate of the Office of Foreign Agricultural Relations, based on information available at this time. Total output may reach 10.9 million short tons of unshelled nuts, compared with the previous record of 10.6 million (revised), produced in 1947. High yields in China, the United States, and French West Africa account principally for the increase. The most notable expansion in output, however, occurred in Brazil.

NORTH AMERICA:

North American production amounted to 1,220,000 tons compared with 1,182,000 in 1947 and 640,000 prewar. The United States, which accounts for approximately 94 percent of the continental total, again produced a record crop. The 1,144,000-ton output represents an increase of 5 percent over last year's harvest and 86 percent over the 1935-39 average. Production has been above the million-ton mark each year since 1942. The 1948 crop is approximately 500,000 tons larger than domestic needs for direct consumption or use as oil. Part of this excess will be crushed in the United States, and part will be exported, largely for crushing abroad.

Mexico's peanut outturn has not been reported, but it is expected to approximate the 1947 crop of 50,000 tons.

Cuba's crop is estimated at only 11,500 tons, less than half the size of last year's and the smallest since 1938. A marked reduction in acreage accounted for most of the decline in output. Many farmers preferred to work in the sugar harvest during the regular spring peanut planting season. Other significant crop-reducing factors were the failure of a considerable amount of seed to germinate because of poor seed and dry weather following the planting season, and the lateness of the crop and unfavorable harvesting weather in Western Cuba.

The 1948 peanut output in the Dominican Republic is reported at 10,500 tons, the largest on record. The previous high was the 10,000-ton crop of 1945. In view of the recent inclination among growers in some areas to plant peanuts in place of corn, a competitive crop for the same land, it is expected that the area planted will exceed 34,000 acres during the year. This is considerably less than last year's planted area, but favorable growing conditions have resulted in higher yields.

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

ASIA:

Asia is expected to produce approximately 7,300,000 tons of peanuts this year, which would be slightly less than in 1947 but about 4 percent more than prewar. Official figures for India, the world's largest producer, have not been received, but it is generally believed that acreage was reduced considerably, especially in Madras Province, which accounts for approximately 40 percent of India's total peanut acreage. Lack of rains during the normal sowing months of June and July delayed and in some areas prevented planting of the 1948-49 winter crop in Madras. In other areas drought in the early stages of plant development necessitated replanting. Erratic seasonal and weather conditions also brought about attacks by insect pests. In addition some land previously planted to peanuts has now been utilized for the cultivation of jute. India's total 1948 output is forecast at about 3,500,000 tons, 10 percent less than in 1947.

Peanut production in China is officially estimated at 3,310,000 tons, representing an increase of 14 percent over both the 1947 crop and the 1935-39 average. Should this estimate materialize, this would be China's largest peanut crop since prewar years. It is possible, however, that the typhoon and floods which have occurred in several parts of the country since the release of this estimate may have reduced the yield. Shantung, the principal peanut-producing province, accounts for 20 percent of the 1948 total.

No official estimates of 1948 peanut production in the Netherlands Indies are yet available, but indications are that the combined output in the Federal and Republican areas will not exceed 165,000 tons. Most of the peanut crop in Java is planted in irrigated fields after the rice crop is harvested. Though crop conditions were generally satisfactory for the first 6 months of the year, the drought which prevailed throughout Java from June into October will undoubtedly have an adverse effect on the acreage planted after June.

Peanut acreage in Burma for 1948, estimated at 570,000 acres, is down somewhat from the 688,000 of 1947. The production estimate for the current year has not been received.

AFRICA:

While official information is available for only a few of the peanut producing areas of Africa, reports on acreage and crop conditions indicate a total production of 1,923,000 tons, an increase of 10 percent over last year's output and about 15 percent over the 1935-39 average. The expansion occurred in French West Africa and Nigeria, the major producing areas of the continent.

Favorable climatic and economic conditions are expected to result in a peanut harvest of 810,000 tons in French West Africa this year. This

(Text continued on page 429; table follows)

PEANUTS 1/: Acreage and production in specified areas, year of harvest, average 1935-39, annual 1944-48

Continent and country	Acreage 2/						Production					
	Average 1935-39	1944	1945	1946	1947	1948 3/	Average 1935-39	1944	1945	1946	1947	1948 3/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons
NORTH AMERICA:												
Mexico	33	108	-	73	-	-	12.2	42.6	38.6	36.7	49.6	-
United States	1,659	3,068	3,160	3,142	3,389	3,340	614.7	1,040.4	1,021.1	1,019.2	1,094.0	1,144.0
Cuba	-	67	118	75	86	37 4/	8.4	25.0	23.5	29.0	23.5	11.5
Dominican Republic	-	30	44	29	43	34 4/	3.8	4.6	10.0	8.9	9.0	10.5
Total 5/	1,800	3,300	3,400	3,330	3,640	3,530	640.0	1,116.0	1,098.0	1,099.0	1,182.0	1,221.0
EUROPE:												
Bulgaria 6/	5	2	3	4	4	-	2.2	.6	.5	1.3	1.3	-
Italy	4/ 2	6	7	7	11	9 4/	1.6	3.9	4.9	4.4	7.9	6.9
Spain	7/ 24	15	15	-	-	- 7/	23.3	11.0	10.4	-	-	-
Total (excl.U.S.S.R) 5/	35	25	30	35	40	40	28.0	16.0	16.0	22.0	26.0	25.0
U.S.S.R. (Europe and Asia)	4/ 29	-	-	-	-	-	-	-	-	-	-	-
ASIA:												
Turkey	1/ 3	5	4	4	-	6 4/	1.9	2.5	1.8	1.9	-	3.9
Burma	784	-	559	572	688	570	192.2	-	126.6	110.2	171.4	-
China 8/	4/ 3,639	3,203	3,214	3,944	3,913	3,881	4/ 2,913.4	2,398.2	2,342.6	3,039.4	2,916.8	3,310.8
Manchuria	-	-	-	-	-	-	4/ 9/ 121.6	-	-	-	-	-
French India	4/ 7	7	7	-	-	-	4/ 5.6	6.1	6.1	-	-	-
French Indochina	42	98	-	-	-	-	16.0	23.0	-	-	-	-
India	7,535	10,574	10,273	9,990	9,974	9,000	3,295.7	4,318.7	3,881.9	3,911.0	3,868.5	3,500.0
Japan	4/ 19	-	-	-	-	-	14.6	-	19.8	19.8	-	-
Formosa	4/ 77	-	-	-	-	-	57.7	23.9	22.7	-	-	-
Kwantung Leased Territory	4/ 101	-	-	-	-	-	4/ 91.1	-	-	-	-	-
Netherlands Indies 10/	572	432	221	326	464	-	289.1	179.1	92.4	116.6	215.5	165.3
Philippine Islands	18	-	-	-	-	-	4.7	-	-	-	-	-
Total (excl.U.S.S.R.) 5/	13,200	15,500	14,800	15,290	15,500	14,200	7,040.0	7,302.0	6,683.0	7,414.0	7,411.0	7,336.0

SOUTH AMERICA:													
Argentina	4/	207	359	351	381	294	304	87.3	219.2	174.4	153.3	117.8	132.3
Brazil		-	77	100	84	-	-	7/ 14.8	35.2	31.5	34.5	45.2	233.2
Paraguay	4/	29	-	14	-	-	-	4/ 19.4	4.4	4.8	5.0	1.7	1.1
Uruguay		5	12	15	15	21	44	1.2	3.9	5.4	4.8	4.8	13.4
Total 5/		400	500	550	550	500	950	129.0	268.5	223.5	205.0	177.0	387.0
AFRICA:													
Anglo Egyptian Sudan		43	55	-	-	-	-	8.1	11.5	-	-	-	-
Belgian Congo	7/	245	-	-	534	546	570	7/ 65.1	-	-	-	-	-
Tanganyika	4/	277	-	-	-	-	-	9/ 23.4	5.6	5.2	3.2	11.0	7.5
Uganda	4/	156	286	357	357	-	-	11/ 2.2	11.8	6.7	7.9	-	-
Gambia		-	-	-	-	-	-	9/ 58.1	-	-	53.2	78.4	-
Egypt		23	27	25	25	26	-	17.2	22.0	20.7	16.9	20.6	-
French Equatorial Africa and Cameroun	4/	388	-	-	-	-	-	7/ 58.8	-	-	-	-	-
French West Africa	4/	2,955	-	-	-	-	-	4/ 875.9	351.3	506.0	559.4	720.0	810.0
Madagascar		14	27	31	30	25	-	6.6	7.7	8.8	8.8	8.0	-
Mozambique		-	-	-	-	-	-	9/ 42.9	9/ 12.5	9/ 28.2	-	24.2	-
Nigeria and Cameroons		-	-	2,500	2,500	2,500	-	9/ 354.7	400.0	616.0	616.0	560.0	616.0
Angola		18	-	-	21	21	-	6.2	7.6	8.4	1.1	1.7	-
Portuguese Guinea 9/		-	-	-	-	-	-	28.0	22.2	40.1	-	-	-
Southern Rhodesia		6	7	7	13	8	10	1.6	2.4	2.6	4.4	2.5	2.7
Union of South Africa 12/		56	-	-	90	100	-	12.0	14.4	4.8	13.7	31.5	69.6
Total 5/		6,120	4,500	6,500	6,500	7,000	7,500	1,673.0	1,068.0	1,500.0	1,605.0	1,742.0	1,923.0
OCEANIA:													
Australia	4/	14	18	19	25	40	66	4/ 6.1	10.8	11.5	14.9	22.4	-
Total Oceania 5/		15	20	25	30	45	70	6.5	11.0	12.0	15.0	23.0	36.0
World total		21,600	23,900	25,400	25,800	26,800	26,400	9,531.0	9,791.0	9,547.0	10,376.0	10,579.0	10,946.0

1/ Peanuts in the shell. Southern Hemisphere peanut crops, which are harvested from April to June, are combined with those of the Northern Hemisphere harvested from September through December of the same year. 2/ Figures refer to harvested areas as far as possible. 3/ Preliminary. 4/ Average of less than 5 years. 5/ Includes estimates for the above countries for which data are not available and for minor producing countries. 6/ Beginning with 1944, figures include Southern Dobrudja. 7/ One year only. 8/ Partly estimated prior to 1946. 9/ Export figures. 10/ Java and Madura. 11/ Exports from Kenya and Uganda. 12/ European farms only.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States Foreign Service officers, results of office research, and other information.

1948 MEDITERRANEAN BASIN ALMOND PRODUCTION BELOW AVERAGE 1/

The 1948 preliminary estimate of shelled almond production in the 6 leading foreign commercial producing countries is 53,200 (revised) short tons compared with 77,500 tons in 1947 (revised) and 71,700 tons in 1946. The estimate is 18 percent smaller than the 5-year (1942-46) average of 65,200 tons and 20 percent smaller than the 10-year (1937-46) average of 66,300 tons. It also is the smallest since 1942 when only 51,200 tons were produced in this group of countries. The small crop in Spain and Italy, the world's largest producer of shelled almonds, have reduced the world total to well below average. Production in Iran, French Morocco, and Portugal was larger than last year.

AIMONDS, SHELLED: Estimated commercial production in specified countries, 1948 with comparisons

(Rounded to nearest 100 short tons)

Country	Average 1942-46	Average 1937-46	1946	1947 a/	1948 a/
	Short tons	Short tons	Short tons	Short tons	Short tons
France	700	700	700	1,000	800
French Morocco	1,800	2,400	2,400	b/ 1,200	b/ 3,300
Iran	6,400	7,100	7,700	b/ 6,000	b/ 7,700
Italy	28,400	29,500	33,000	b/46,200	b/ 18,700
Portugal	2,400	2,600	3,700	1,100	b/ 2,900
Spain	25,500	24,000	24,200	22,000	b/ 19,800
Foreign total	65,200	66,300	71,700	b/77,500	b/ 53,200
United States, unshelled	b/ 26,100	b/ 20,500	37,800	29,200	29,600

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research, or other information.

a/ Preliminary
b/ Revised

1/ A more extensive statement can be obtained from the Office of Foreign Agricultural Relations.

Growing conditions in all countries except Italy and Spain during 1948 were satisfactory although somewhat spotty. The pre-Easter frosts in the Bari district in Italy brought disaster to the almond crop. Harvesting everywhere was accomplished satisfactorily with adequate labor and transportation.

The quality generally is equal or superior to that of the previous season with one exception. That was in French Morocco, where a considerable percentage of poor kernels are reported.

The 1947-48 marketing season closed with an estimated carry-over of 23,600 tons (shelled basis) from the 1947 harvest, of which 15,400 tons were in Italy, 7,000 tons in Spain, 100 tons in Iran, and 1,100 tons in Portugal. The bulk of this tonnage is still in the hands of growers who sell reluctantly and only when seriously needing money. Exports during the season were as anticipated, well below a normal prewar year. Official export statistics in these countries are usually released several months after the close of the season. On the basis of trade estimates, about 35,200 tons, or about 45 percent of the 1947 crop were moved into export channels, with the United Kingdom and the United States the principal importers. The United Kingdom purchases were not as select as those of the United States, the latter purchasing mostly small-sized kernels and specialty types. The continued absence of Germany from the international almond market was felt keenly by Italy and Spain. High prices in Spain prevented that country from doing a normal export business, although during the second half of the season the volume was increased by use of various schemes.

The 1948-49 marketing season started slowly in most countries and still is not overly active. In Spain, the market is almost at a complete standstill due to the failure of the Spanish Government to establish a new marketing program.

In French Morocco, one of the minor producers, business has been very active; however, almost all of it is with France. The British Ministry of Foods is reported interested in a large tonnage, and still offering £165 per ton of 2,200 pounds, (about U.S.$665). The British offer is not very attractive to Spanish and Italian exporters. The possibility that almonds may again be used for oil in Italy this season hinges on a further increase in oil prices or a fall in nut prices. Early in the season foreign exporters reported fewer enquiries from United States importers than last spring. They were, as a rule, not very optimistic about possible exports to the United States. However, by late September business increased as the season advanced. Declared exports to the United States during August, September and October totaled 951 short tons, all from Italy. The declared exports from Italy to the United States during October totaled 711 short tons, shelled basis. If this rate is maintained for the balance of the season, United States imports of Italian almonds could easily exceed that of a year ago.

The reported large carry-over of imported and domestic almonds from last year, the record pecan crop, the large almond crop in California with prices below last year, and election year uncertainty are given as reasons for probable smaller imports. It now appears that unless business from abroad increases, most of these countries will be faced with a substantial carry-over in 1949.

UNITED STATES: Imports for consumption of shelled and unshelled almonds from specified countries, 1947-48, with comparisons
Season, September - August

Year	French Morocco	Italy	Portugal	Spain	Other countries	Total
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Shelled						
Average						
1942-46	16	712	769	4,619	71	6,187
1937-46	15	540	487	2,430	175	3,647
Annual:						
1942-43	1	0	480	14	121	616
1943-44	0	0	1,271	6,930	53	8,254
1944-45	15	0	1,218	8,061	31	9,325
1945-46	28	1,508	688	7,140	73	9,437
1946-47	34	2,054	187	950	76	3,301
1947-48	27	4,179	98	1,805	26	6,135
Unshelled						
Average						
1942-46	0	1	5	201	2	209
1937-46	0	1	3	100	1	105
Annual:						
1942-43	0	0	0	0	0	0
1943-44	0	0	14	425	0	439
1944-45	0	0	11	170	0	181
1945-46	0	0	0	263	5	268
1946-47	0	6	0	145	6	157
1947-48	0	9	0	0	a/	9

a/ Less than one half ton.

Compiled from official records of the Bureau of the Census.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, Gustave Burmeister and Walter R. Schreiber.

WORLD WOOL PRODUCTION MAINTAINED IN 1948

A world wool production in 1948 of 3,730 million pounds is now indicated by reports received by the Office of Foreign Agricultural Relations. This total production, which includes both apparel and carpet wool, is less than 1 percent above the 1947 production but below earlier indications for this year.

The world estimate for 1948 is based upon reports of the clip shorn last spring in the Northern Hemisphere and on estimates of the Southern Hemisphere clip now in progress. Subsequent to the forward estimates for the latter area made last June, a deterioration of nearly 10 percent has occurred in the Argentine clip.

Generally favorable weather and forage conditions have prevailed during the past year in nearly all producing areas except Argentina. This, together with the strengthening of wool prices begun in 1947, has tended to cause wool production to be maintained or increased in most wool-producing countries. The notable exception is in the United States and Canada, where decreases due largely to the competition of other farm enterprises are continuing.

The 1948 estimate of world production of 3,730 million pounds is about 200 million pounds below the average annual production of 3,920 million pounds for the years 1936-40. Other comparisons for the world and for continents are contained in the following table:

WOOL: Estimated world production, greasy basis, by continents, averages 1941-42 and 1945-48, annual 1941-48.

Continent	Average 1931-35	Average 1936-40	1941	1942	1945	1946	1947	1948
	Mil. pounds	Mil. pounds	Mil. pounds	Mil. pounds	Mil. pounds	Mil. pounds	Mil. pounds	Mil. pounds
No. America	458	452	480	483	409	370	334	312
Europe	499	514	495	483	407	416	408	420
U.S.S.R.	160	272	300	290	250	260	270	285
So. America	576	639	714	737	791	813	763	715
Africa	1,343	337	345	350	298	284	268	279
Oceania	1,292	1,366	1,512	1,491	1,298	1,334	1,336	1,386
Asia	318	344	354	338	332	340	330	331
Total 1/	3,640	3,920	4,200	4,170	3,790	3,820	3,710	3,730

1/ Rounded to tens of millions.

Office of Foreign Agricultural Relations, November 29, 1948.

(Text continued on page 440; table follows)

WOOL: Production in specified countries, greasy basis, averages 1931-35, 1936-40, annual 1943-48 1/

Country and continent	Averages 1931-35	Averages 1936-40	1943	1944	1945	1946	1947 2/	1948 2/
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
NORTH AMERICA:								
Canada	17.3	15.6	17.8	19.3	19.6	17.1	14.1	11.7
United States.								
Shorn	366.3	360.6	378.8	338.3	307.9	279.9	256.3	237.3
Pulled	64.8	64.7	65.2	73.5	70.5	61.3	52.0	52.0
Total	431.1	425.3	444.0	411.8	378.4	341.2	308.3	289.3
Estimated total 3/	458.2	451.7	472.8	442.2	409.2	369.5	333.6	312.2
EUROPE:								
Austria	1.2	1.3	1.8	2.0	2.0	1.7	1.8	2.0
Bulgaria	26.8	28.7 4/	28.2 4/	23.4 4/	19.3 4/	21.9 4/	25.7 4/	28.6
Eire	18.4	17.2	15.3	15.9	16.1	14.5	13.0	12.0
Estonia	1.9	2.4	-	-	-	-	-	-
Finland	2.3	2.7	1.8	2.2	2.2	2.6	2.4	2.4
France 5/	36.9	37.1	26.9	26.0	25.0	26.5	28.6	29.3
Germany	30.5	39.8	-	-	-	-	-	-
Greece	17.7	19.3	11.4	9.3	11.2	13.5	16.7	17.0
Hungary	11.4	12.9	8.6	8.2	2.3	3.3	4.0	5.0
Italy	31.0	30.4	26.7	23.4	23.8	24.7	27.0	28.0
Latvia	4.2	5.9	-	-	-	-	-	-
Lithuania	3.7	3.6	-	-	-	-	-	-
Netherlands	2.9	3.1	2.2	2.4	2.4	2.7	2.3	2.2
Norway	5.8	5.9	5.8	6.2	6.1	5.8	6.0	6.3
Poland	9.9	11.8	-	-	-	-	-	-
Portugal	15.8	16.3	17.1	16.7	15.8	17.6	18.0	18.0
Rumania	53.9	50.3	-	-	-	-	-	-
Spain	68.9	70.0	83.5	88.0	81.5	79.0	77.0	88.0
United Kingdom	113.8	110.1	90.4	85.6	83.7	87.5	70.0	70.0
Yugoslavia	30.7	34.7	-	-	-	-	-	-
Estimated total 6/	499.0	514.4	464.2	454.3	406.9	416.7	406.5	425.5
U.S.S.R.	159.6	272.0	260.0	245.0	250.0	260.0	270.0	285.0
ASIA:								
Iran	38.0	36.3	27.5	27.7	28.7	29.5	30.0	30.0
Iraq	18.5	21.6	21.0	22.0	23.0	24.2	24.2	24.2
Lebanon	-	-	-	-	-	1.0	0.9	1.1
Syria 7/	11.1 7/	10.7 7/	10.0 7/	12.0 7/	13.6	13.3	12.1	12.1
Turkey	41.4	67.7	62.0	67.0	70.0	69.0	60.2	64.1
Afghanistan	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0
China 8/	90.0	88.0	85.0	75.0	75.0	75.0	75.0	75.0
India 9/	71.9 9/	72.9 9/	80.0 9/	76.0 9/	75.0	54.5	54.5	53.0
Pakistan	-	-	-	-	-	26.0	26.0	25.6
Estimated total 10/	318.1	344.2	332.5	326.8	332.5	339.8	330.2	331.8

WOOL: Production in specified countries, greasy basis, averages 1931-35; 1936-40, annual 1943-48 1/

Country and continent	Averages 1931-35	Averages 1936-40	1943	1944	1945	1946	1947 2/	1948 2/
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
SOUTH AMERICA:								
Argentina 11/	361.0	411.0	515.0	505.0	505.0	515.0	475.0	430.0
Brazil 12/	35.0	35.5	39.0	40.0	39.0	51.0	48.0	50.0
Chile	33.8	32.6	35.0	34.0	34.8	33.0	44.1	46.3
Peru 13/	18.4	19.4	19.0	19.8	20.1	20.1	20.1	20.7
Uruguay 14/	110.6	126.2	147.9	156.6	175.2	176.0	158.7	149.9
Estimated total 15/	574.8	638.9	771.6	771.6	791.0	812.6	763.4	714.7
AFRICA:								
Algeria	19.1	22.6	23.0	22.7	21.6	19.8	13.8	18.3
French Morocco	30.7	35.1	40.0	39.0	40.0	30.0	25.0	28.0
Tunisia	11.9	12.0	14.5	13.0	13.2	11.8	11.0	7.9
Union of South Africa 16/	269.5	252.3	250.0	234.0	210.0	209.3	205.2	212.0
Estimated total 17/	343.1	336.8	339.9	321.3	297.5	283.7	267.5	279.0
OCEANIA:								
Australia	1,010.5	1,051.9	1,169.0	1,016.5	932.9	974.0	990.0	1,040.0
New Zealand	281.1	313.8	330.0	372.0	365.0	360.0	345.6	345.4
Estimated total	1,291.8	1,365.9	1,499.1	1,388.6	1,298.0	1,334.1	1,335.7	1,385.5
Estimated world total 18/	3,640.0	3,920.0	4,140.0	3,950.0	3,790.0	3,820.0	3,710.0	3,730.0

1/ For summary purposes wool produced mostly in the Spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. 2/ Preliminary. 3/ Includes estimates for Mexico, Newfoundland, Netherlands West Indies, Guatemala and El Salvador. 4/ Includes Southern Dobrudja with Bulgaria and excludes it from Rumania for these years. 5/ Data for years 1945 and 1946 not comparable with prewar and 1947. 6/ Includes estimates for countries producing 2 million pounds or less, namely Albania, Belgium, Czechoslovakia, Denmark, Iceland, Sweden and Switzerland. 7/ Includes Lebanon. 8/ Includes China Proper (22 Provinces), Manchuria, Jehol and Sinkiang (Turkestan). 9/ Includes what is now Pakistan. 10/ Includes estimates for Cyprus, Pales, Trans-Jordan and Outer Mongolia. 11/ Based on estimates of the Buenos Aires Branch, First National Bank of Boston except 1948. 12/ Estimates based largely on production in Rio Grande do Sul, which produces about 80 percent of the total. 13/ Based on surveys of the Junta Nacional de la Industria Lanar. 14/ Estimates of the Camara Mercantil de Productos del Pais (Mercantile Exchange of Uruguay). 15/ Includes relatively small production in Bolivia, Colombia, Ecuador, Falkland Islands, Paraguay, and Venezuela. 16/ Union of South Africa, Union Protectorates and South West Africa. 17/ Includes estimates for Kenya, French West Africa and Togo and Libya. 18/ Rounded to tens of millions.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States Foreign Service officers, results of office research, and other information. Estimates for countries having changed boundaries have been adjusted to prewar boundaries except as noted.

COMMODITY DEVELOPMENTS

FATS AND OILS

NETHERLANDS INDIES COPRA
EXPORTS LOWEST SINCE MARCH 1/

Netherlands Indies copra exports during October were the lowest monthly shipments since March, after having reached the postwar peak in September. Only 14,753 long tons were exported compared with 31,002 the previous month. This brings the 10-month total to 196,337 tons, representing a 30 percent increase over the entire quantity exported in 1947. The Netherlands received over 9,000 tons, Belgium and France almost 2,000 each, and Switzerland and the United States approximately 1,000. November and December exports are forecast at about 27,000 and 13,000 tons, respectively.

NETHERLANDS INDIES: Copra exports, October 1948 with comparisons,
(Long tons)

Country	Copra distribution				
	Average		Jan.-Sept:	October	
	1935-39	1947 a/	1948 a/	1947 a/	1948 a/
Canada	-	-	7,216	-	-
Mexico	12,614	-	-	-	-
United States	3,909	1,546	4,946	-	797
Belgium	8,053	-	3,051	-	1,998
Czechoslovakia	4,896	5,000	2,000	-	-
Denmark	72,375	7,999	4,134	-	-
France	12,748	4,000	3,968	-	1,939
Bi-Zonal Germany	64,674	-	9,972	-	-
Italy	23,103	-	-	-	-
Netherlands	133,841	114,157	133,361	2,413	9,015
Norway	31,810	5,469	1,000	2,000	-
Poland	1,422	-	2,460	-	-
Sweden	6,886	3,200	5,984	3,200	-
Switzerland	17	2,082	3,492	-	1,004
Singapore	107,285	-	-	-	-
Union of South Africa	-	5,249	-	-	-
Others	23,752	1,525	-	-	-
Total	507,385	b/150,227	b/181,584	b/ 7,613	b/ 14,753

a/ Preliminary. b/ Does not include unrecorded shipments to Singapore. Copra Board, Batavia

Despite the drop in exports, October output was slightly larger than in September, 33,300 tons against 33,200. November production is expected to drop to 28,000. October deliveries to crushers amounted to 7,900 tons and month-end stocks, 37,000. Prices remained unchanged.

1/ A more extensive statement can be obtained from the Office of Foreign Agricultural Relations.

ARGENTINE TALLOW AND CATTLE-FAT EXPORTS

The following table shows Argentine tallow and cattle-fat exports for August 1948, with comparisons:

ARGENTINA: Tallow and cattle-fat exports, August 1948 with comparisons
(Gross weight)

Country of destination	Average 1935-39	1947	January-August 1947	January-August 1948 a/	August 1948 a/
	Short tons	Short tons	Short tons	Short tons	Short tons
North America:					
Canada	7	-	-	6,380	-
Cuba	377	15	15	1,984	217
Mexico	11	659	656	-	-
Others	9,935	799	779	503	-
Total	10,330	1,473	1,450	8,867	217
South America	1,914	4,807	4,232	4,648	76
Europe:					
Belgium	2,974	1,596	1,118	470	-
France	937	1,238	1,238	3,886	-
Italy	2,082	3,481	2,584	13	-
Netherlands	7,875	2,988	2,988	553	-
Spain	1,296	8,106	3,897	-	-
Sweden	1,695	2,513	2,513	-	-
Switzerland	1,133	1,202	1,088	481	-
United Kingdom	17,903	19,374	14,706	25,405	3,403
Others	16,767	2,798	1,858	2,246	-
Total	52,662	43,296	31,990	33,054	3,403
Japan	21	-	-	6,890	6,890
Soviet Union	-	4,508	4,508	-	-
Others	313	661	518	646	-
Grand total	65,240	54,745	42,698	54,105	10,586

a/ Preliminary.
Compiled from official sources and consular reports.

CORRECTION

In the table, "U. S. Imports of Specified Vegetable Oils and Oilseeds", on page 408 of Foreign Crops and Markets, November 22, 1948, the coconut-oil figure for January-September 1948 should be 61,122 instead of 60,616. In the table, "U. S. Exports of Specified Fats, Oils and Oilseeds", page 409, the soybean figure for January-September 1947 should be 1,881 instead of 1,142, and the inedible tallow figure for January-September 1948 should be 43,233 instead of 7,247.

ARGENTINE LARD
EXPORTS

The following table shows Argentine lard exports for August 1948 with comparisons:

ARGENTINA: Lard exports, August 1948 with comparisons
(Gross weight)

Country of destination	Average 1935-39	1947	January-August 1947	January-August 1948 a/	August 1948 a/
	Short tons	Short tons	Short tons	Short tons	Short tons
North America:					
Cuba	-	-	-	740	243
Netherlands West Indies	-	583	583	1	-
Others	-	141	141	-	-
Total	-	724	724	741	243
South America	685	3,283	2,816	974	20
Europe:					
Hungary	-	2,389	2,389	446	-
Italy	127	4,234	3,834	817	-
United Kingdom	6,673	3,821	3,755	6,671	1,488
Others	919	585	582	170	-
Total	7,719	11,029	10,560	8,104	1,488
Others	163	157	157	27	8
Grand total	8,567	15,193	14,257	9,846	1,759

a/ Preliminary.
Compiled from official sources and consular reports.

FRUITS, VEGETABLES AND NUTS

SOUTH AFRICAN CROP
TO BE LARGER IN 1949

Citrus production in South Africa for the 1949-50 season (March 1-February 28) is forecast at 7,071,000 boxes of 70 pounds, 10 percent above the 6,429,000-box crop of the preceding year and 55 percent above the prewar (1935-39) average of 4,573,000 boxes. This estimate includes oranges at 6,011,000 boxes, grapefruit at 848,000 boxes and lemons at 212,000 boxes.

CITRUS: Production in South Africa, average 1935-39, annual 1946-49

Year average	Oranges 1,000 boxes	Grapefruit 1,000 boxes	Lemons 1,000 boxes	Total
1935-39	4,000	431	142	4,573
1946	4,505	636	159	5,300
1947	5,326	752	188	6,266
1948	5,464	772	193	6,429
1949	6,011	848	212	7,071

ALGERIA'S ORANGE PRODUCTION HIGHER

The first estimate of the orange, tangerine and clementine crop in Algeria for 1948 indicates an output of 5.4 million boxes. This is the largest on record and 45 percent higher than the 1947-48 outturn of 3.7 million and 28 percent above the large production of 4.2 million boxes in 1939-40.

The Algerian orange crop is estimated at 3.8 million boxes, as compared with 2.4 million for the previous year and the prewar average of 1.7 million. The tangerine crop (including clementines) is indicated to be 1.7 million boxes, compared with 1.4 million for the previous season and the prewar average. The large yield is due to well-distributed rainfall in the spring and early summer, adequate use of fertilizers, increased use of mechanical equipment in the orchards, and cool fall days which reduced the ravages of the fruit fly.

WORLD WOOL PRODUCTION--(Continued from Page 434)

Of the total world production of wool in 1948, about 78.2 percent is estimated as apparel-type wool and the balance carpet wool. This is only a slight change from the division in 1946 and 1947 when 79.1 and 78.5 percent, respectively, of total production was of the apparel type.

Production of wool in 1948 in Canada and the United States continued the downward trend begun three and four years ago. During 1948 the decline in the United States has been accelerated by poor grazing conditions in the major sheep areas of the Great Plains. Further declines in output are anticipated as returns from competing farm enterprises remain more attractive than sheep and wool.

The production of wool in Europe in 1948 exceeds the output in 1947. The largest increase is reported in Spain, normally the second largest producing country in Europe. A rise of about 14 percent in the 1948 Spanish clip as compared with last season is indicated. Because of the unusually favorable pasture conditions during the early part of the year, the 1948 output is estimated at 88 million pounds, grease basis, against 77 million a year ago. The estimate for 1948 indicates the largest output since prior to the Spanish Civil War (1936-39). Production in the United Kingdom, France, Italy and Germany, the other principal producing countries in Europe, is expected to equal or exceed slightly the output in 1947. The output in some of the minor producing countries in Central and Northwestern Europe is expected to be slightly below that of 1947 because of unfavorable pasture and crop conditions that prevailed in the summer of 1947.

Some increase in wool production in the Soviet Union, compared to previous years, is indicated for 1948. The breeding of sheep in many parts of the Soviet Union has received considerable attention in the past 15 years. Improvement in flocks and the need for wool are believed to be factors bringing about an increase in output in the Soviet Union.

Only minor changes in wool production in countries in Asia have been reported. The production of coarse wool in India and Pakistan is believed to be slightly lower in 1948 than a year earlier. Drought conditions in some of the wool-producing provinces, together with problems relating to partitioning of the two countries, have reduced prospects. The fighting occurring in North China may reduce the output of wool in that area, but the extent of any such reduction is unknown. The fighting is expected to have more effect upon the movement of wool from that country than upon actual production. Wool production in the Middle East remains relatively unchanged.

Wool production prospects in South America for the season begun this fall are below earlier indications as a result of severe winter weather, including heavy snowfall after mid-July in some regions in Patagonia. Largely as a result of these conditions, the Argentine clip of Merino, fine crossbred and medium crossbred wools is expected to drop 7 percent below last year. In addition, a drop of 15 percent in output of Argentine coarse wool is expected as a result of drought conditions and sheep losses during the past fall and winter among the native flocks in northwestern sections of Argentina. The overall decline in Argentine output of wool this season compared to last is generally estimated at 10 percent. On the basis of the revised 1947-48 estimated output of 475 million pounds, the current season output is placed at 430 million pounds. In Uruguay the 1948 shearing season has been delayed due to weather conditions and the current clip is estimated at 150 million pounds compared to last year's clip of 159 million pounds. Wool prospects in Rio Grande do Sul, the principal producing State in Brazil, are excellent according to recent reports. The weather during the recent winter was exceptionally mild and the sheep death rate was unusually low.

In the Union of South Africa, weather and pasture conditions during the past few months have remained favorable for sheep and wool production. Wool production during the current season is expected to be 7 million pounds above the low production last season. The almost steady increase in fine wool prices over the past two years, along with improved producing conditions, have been incentives to an increase in production.

Except for some further deterioration in pastures in the northwestern and central western sections of Queensland, sheep and wool producing conditions in Australia have continued favorable the past six months. Thus, wool production for the current season will continue the upward trend in production experienced since the low level of 1945. Production this season will be near the average for the years 1936-40 but will be more than 100 million pounds below the average of the peak years 1941, 1942 and 1943. Had further deterioration not occurred in Queensland, production for the 1948-49 season might have reached 1,065 million pounds or 25 million pounds above present estimates. It is

estimated that the 1948-49 season's clip will be composed of 73½ percent Merino and 26½ percent crossbred wool. In the 1946-47 season, the estimates were for 80 percent Merino and 20 percent crossbred.

Shorn wool production in New Zealand this year is expected to be above last year but an offsetting decrease in the production of slipe wool will result in an estimated total output of 345 million pounds, down 200,000 pounds from last season.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of C. M. Purves, Acting Chairman, Floyd E. Davis, Anna A. Jones, Constance H. Farnworth and Mary E. Long.

WORLD BREADGRAIN---(Continued from Page 420)

Generally favorable prospects are reported for Australia, and the crop is now forecast at about 185 million bushels. This compares with the record crop for 1947 now reported at 220 million bushels. The present outlook is for better-than-average yields.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of C. M. Purves, Acting Chairman, Robert L. Gastineau, Judith E. Downey, Lois B. Bacon. Mary E. Long and Constance H. Farnworth.

WORLD SUGAR PRODUCTION---(Continued from Page 424)

with 5,038,000 tons in 1947-48 and the 5-year (1935-39) average of 7,408,000 tons. The favorable conditions this year has resulted in the production in many countries reaching prewar levels and in some it has gone above. Only in Austria and Germany does production remain substantially below prewar.

In the U.S.S.R., an increase in the acreage of sugar beets of about 19 percent was reported this year, which, with a slight improvement in yields, indicates a sugar production of 2,500,000 short tons. This is about one-fifth more than the 2,050,000 tons produced in 1947-48, but about 13 percent less than in prewar years.

In Asia, sugar production continues to recover from the wartime low levels. For the area as a whole, production in 1948-49 is indicated at 9,814.000 tons compared with 8,398,000 tons in 1947-48 and the 5-year (1935-39) average of 10,813,000 tons. Production in India and Pakistan in terms of gur is expected to be up about 10 percent over last year, and is due largely to increases in acreages planted to sugarcane. In the 3 important exporting areas, the Philippines, Formosa and Java, production is expected to increase sharply this year, with the Philippines making the greatest progress. In the other 2 areas, many difficulties have beset the sugar industry and recovery is rather slow.

Sugar production in South America as a whole is expected to total 3,151,000 tons in 1948-49 compared with 3,171,000 tons in 1947-48 and the 5-year (1935-39) average of 2,414,000 tons. A decrease in Argentina more than offset slight increase in several other countries.

In Africa, sugar production is expected to total 1,586,000 tons in 1948-49 compared with 1,490,000 tons in 1947-48 and the prewar average of 1,295,000 tons. British East Africa, Egypt and Mauritius all have prospects of record large crops this season. There also are good prospects in a number of other areas.

Australia has a good cane crop this season and production is expected to total 940,000 tons or more than the prewar average. Hawaii and the Fiji Islands also have excellent prospects. Sugar production for Oceania as a whole is indicated at 2,070,000 tons compared with 1,718,000 in 1947-48 and the prewar average of 2,092,000 tons.

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WORLD PEANUTS -- (Continued from Page 428)

is 12 percent larger than in 1947 and apparently the largest crop since before the war. A fair amount of rain and a substantial rise in the price paid to the producer are contributing factors. The higher price has in turn attracted more migratory workers for the harvest, somewhat alleviating the usual labor shortage.

The price now paid to the producers is 12.50 CAF francs per kilo ($90 per short ton, converted at the official rate of exchange), somewhat more than last year's 7 CFA francs ($50).

From the present crop, about 35,000 tons will go to the peanut oil factories of North Africa, 154,000 to those of French West Africa, and the remainder to France.

Nigerian peanut output is estimated at 616,000 tons, compared with 560,000 in 1947. The present peanut producing area is in the northern part of the territory centered in Kano Province which produces about one-half of the exportable surplus from Nigeria. Soil depletion, wind erosion, and the high ratio of population to the land are major reasons why production cannot greatly be expanded in the present areas. In addition, it is generally believed that the area devoted to peanuts cannot be increased without seriously unbalancing the primitive economy of the people. (Corn and millet, the main food crops, are planted first and the remainder of the land is planted to peanuts.) The planting of new areas, use of farm machinery, fertilizers, and other advanced methods are, however, contemplated. It is estimated that if the plan is put into practice, an additional 56,000 tons may be available for export.

The new crop year for peanuts in Nigeria began on November 5, 1948. It is estimated that exports will be about 400,000 tons, a larger than average quantity. However, due to the continuing internal transportation shortage, it is a foregone conclusion that the entire exportable portion of the crop will not reach a seaport before the next harvest is ready.

The entire export crop is under strict governmental control. The price to producers has been fixed at £ 19-4-2 per long ton ($69 per short ton).

The outlook of the peanut crop for the coming year is good; rail transportation is still inadequate, but new machinery and equipment, plus the use of waterways, should eventually solve this difficulty. There are no serious labor and industrial problems, although it is generally thought that were modern methods of cultivation adopted, the production would be increased.

Reports state that total current production of peanuts in the Belgian Congo is not known. It is estimated, however, that the acreage in 1948 amounted to about 570,000 acres compared with 546,000 in 1947. Peanuts are grown almost entirely for native consumption. An experimental plantation of about 1,000 acres has been started to determine

the feasibility of plantation production, but even this is primarily set up as a means of getting additional food for the natives. If this proves successful, similar projects probably will be undertaken.

The Union of South Africa, for the third successive year, more than doubled the peanut output of the previous year. Approximately 70,000 tons were produced in 1948 compared with 32,000 a year ago and only 12,000 before the war. About 300,000 bags of unshelled peanuts or approximately 10,000 tons of equivalent in shelled peanuts will be required by the edible trade. That will leave about 35,000 tons (shelled) for crushing. The support price for peanuts is £58-10 ($234), shelled basis, a far more attractive price to growers than the support price for corn. The crushers have agreed to pay the same price for next year's crop. Growers in the Union are attempting to increase mechanization of peanut production.

Tanganyikan peanut production dropped from 11,000 tons in 1947 to 7,500 in 1948, exclusive of peanuts from the British East African project. Although the original plan for the project called for land development in Kenya, Northern Rhodesia, and Tanganyika, the plan now is to concentrate on three areas in Tanganyika. One is at Kongwa where 3 units of 30,000 acres each have been started. This land will not all be planted to peanuts; some will be devoted to sorghum and some to sunflowers. Only about 7,000 acres were planted to peanuts last year, and the yields and production from the over-all planting were not indicative of what can be expected from the project. Although the land was not in proper condition for planting, it seemed advisable to have one year's experience with operating on a relatively large scale.

The directors hope to plant about 50,000 to 60,000 acres to peanuts and sunflowers for harvest in 1949, but whether this can be accomplished depends on the progress of root cutting and the amount of heavy equipment that can be placed in operation between now and planting time. For the next two or three years exports from the peanut project will be small. Much of the crop will be needed for seeding, and the area will be brought into production at a much slower rate than was originally intended.

SOUTH AMERICA:

South America's peanut output of 387,000 tons for 1948 is doubtless a record for that continent. This is attributed to the enormous increase in Brazil, which has never before been a peanut producer of any significance. The current outturn amounted to 233,000 tons compared with only 45,000 a year ago and only about 15,000 prewar. Of the total crop, 215,000 tons were produced in Sao Paulo. At the Sao Paulo price of 100 to 108 cruzeiros per bag of 25 kilograms ($192-208 per short ton) which existed at planting time a year ago, peanuts appeared to be a profitable crop. Growers were encouraged to increase production not only by the Government but also by the vegetable-oil industry, which, because of the shortage of cottonseed, was faced with the prospect of operating at well below capacity unless an expansion in the production of peanuts could be promoted. In many cases the operators furnished the growers with seed

for planting and credit to cover production costs. As a result of these factors, the peanut area was greatly expanded and a record crop was realized.

Argentina, normally the largest peanut producing country of South America, dropped to second place this year with an output of 132,000 tons from 300,000 acres. The 1948 crop, however, shows an increase of about 12 percent over last year's. Definite official encouragement of peanut plantings was given on September 22, 1948, when the Government raised its buying price for shelled peanuts of the 1948-49 crop, basis on track at Buenos Aires, to 50 pesos per 100 kilograms ($135 per short ton), that is 7 pesos higher than had been offered for the preceding crop. It may be assumed, therefore, that on any wheat or flax areas abandoned in east central Cordoba and for a limited distance into west central Santa Fe where the soil is sufficiently sandy, peanuts will be favored as the catch crop. Acreage for the new crop, now being planted, is unofficially estimated at 380,000 acres.

Uruguay also produced a record crop of peanuts in 1948 with an outturn of 13,400 tons compared with only 4,800 in 1947 and 1,200 prewar. Acreage planted to peanuts and sunflowers has been greatly expanded during the past few years with the purpose of supplying the demand for cooking oils for domestic consumption. Most of the peanuts are grown on the sandy soils of Rivera, Tacuarembo, and Salto. Peanut oil is preferred to sunflower oil and is used chiefly for blending. The established price for peanuts from the 1947-48 crop is 300 pesos per metric ton ($143 per short ton). Favorable prices for both peanuts and oil probably are encouraging farmers at present to plant an even greater area to peanuts for the harvest in the spring of 1949.

This is one of a series of regularly scheduled reports on world agricultural production prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of C. M. Purves, Acting Chairman, R. S. Kifer, Regina H. Boyle, and Helen Francis.

COTTON AND OTHER FIBER

COTTON-PRICE QUOTATIONS ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets, converted at current rates of exchange:

COTTON: Spot prices in certain foreign markets, and the U.S. gulf-port average

Market location kind, and quality	Date 1948	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria		Kantar			
Ashmouni, Good	11-25	99.05 lbs.	Tallari	48.10	40.13
Ashmouni, F.G.F.	"	"	"	44.85	37.42
Karnak, Good	"	"	"	78.80	65.75
Karnak, F.G.F.	"	"	"	(not	quoted)
Bombay		Candy			
Jarila, Fine		784 lbs.	Rupee		
Broach, Fine		"	"	(Market	closed)
Kampala, East Africa		"	"		
Karachi		Maund			
4F Punjab, S.G., Fine	11-24	82.28 lbs.	"	74.00	27.13
289F Sind, S.G., Fine	"	"	"	88.00	32.27
289F Punjab, S.G., Fine	"	"	"	95.00	34.83
Buenos Aires		Metric ton			
Type B		2204.6 lbs.	Peso		
Lima		Sp. quintal			
Tanguis, Type 5		101.4 lbs.	Sol		
Pima, Type 1		"	"		
Recife		Arroba			
Mata, Type 4	11-25	33.07 lbs.	Cruzeiro	187.00	30.77
Sertao, Type 5	"	"	"	195.00	32.08
Sao Paulo					
Sal Paulo, Type 5	11-24	2		207.00	34.06
Torreon		Sp. quintal			
Middling, 15/16"	"	101.4 lbs.	Peso	181.00	25.89
Houston-Galveston-New Orleans av. Mid. 15/16"	"	Pound	Cent	XXXX	31.37

Quotations of foreign markets reported by cable. U.S. quotations from designated spot markets.